

PROPERTY ASSESSMENT SPECIALIST I
PROPERTY ASSESSMENT SPECIALIST II
PROPERTY ASSESSMENT SPECIALIST III

Class No. 005511
Class No. 005517
Class No. 005518

DEFINITION:

Under general supervision, to collect, verify and classify data for property tax assessments; to analyze complex questions of reappraisability; and to perform related work.

DISTINGUISHING CHARACTERISTICS:

Positions in this class series are allocated only to the Department of the Assessor/Recorder/County Clerk.

Property Assessment Specialist I: This is the entry-level class, which performs paraprofessional work in ownership issues and appraisal of real and personal property for taxation purposes. This class is distinguished from the next higher class, Property Assessment Specialist II, in that the latter independently applies laws and regulations to verify, prepare or correct property assessments.

Property Assessment Specialist II: This is the journey-level class responsible for applying appraisal techniques and office procedures independently to determine valuation on the most simplistic types of property; such as apartment house furnishings, determines property ownership, replacement cost factors and act as liaison between appraisers and the computer system. This class is distinguished from the next higher class, Property Assessment Specialist III, in that the latter performs the most complex appraiser support work and research for Assessment Appeals Board Hearings.

Property Assessment Specialist III: This is the highest class responsible for more complex specialized/routine property appraisals such as leased equipment, and mobile homes, or the most complex work on ownership reappraisability, fractional interest transfers and documentation for Assessment Appeals Board Hearings. This class differs from the next lower class, Property Assessment Specialist II, in that the latter places value on only the most simplistic types of property and does not make appearances before the Assessment Appeals Board. This class differs from the Appraiser class by the emphasis on data collection, property classification and record correction. Appraisal activity is restricted to the most routine appraisals of personal and real property.

EXAMPLES OF DUTIES:

Responds to public inquiries, both in person and via phone, regarding appraisals, appraisal procedures and assessment laws, regular and supplemental tax bills, change of ownership, valuation problems and the operations of the Assessor's office; prepares correspondence notifying taxpayers of assessment changes or Assessment Appeals Board actions affecting them; updates field book by physically canvassing businesses to ascertain location, mailing address, ownership and type of business; utilizes computerized tracking and spreadsheet programs to assist appraisal staff with record searches and corrections on valuations, ownership and processing; dispenses information on leasing and business tax bills and business property statements; cancels bills and submits roll corrections at the direction of appraisal staff; conducts title researches for change of ownership appraisals and reviews records to determine occurrence of reappraisal events; corrects multi-system computer records; tracks reappraisability of fractional transfers of ownership; investigates calamity claims; performs mathematical calculations and uses tables to compute values and cost figures for apartment buildings, boats and personal property; codes complex structures for Computer Assisted Mass Appraisal; reviews appraisal calculations; determines use of proper roll values; reviews computerized record corrections for completeness and accuracy; traces property and establishes ownership through dock checks, correspondence, escrow and leasing documents.

Property Assessment Specialist III (in addition to above):

Checks Appeals Board actions and roll corrections for technical accuracy; analyzes the most complex changes of ownership and reappraisability; reviews supporting documents to verify fractional interest transfers and assessed value calculations; responds to the most complex inquiries, in person or via phone or letter, regarding appraisal procedures and interpretation of the Revenue and Taxation Code and California Property Tax Rules; performs routine appraisals using tables and published guidelines and books to determine value; initiates Assessment Board action to resolve problems; acts as specialist on the Revenue and Taxation and Property Tax provisions in their assigned specialization or area of work; provides testimony at Appeals Board Meeting on change of ownership issues; cancels tax bills; performs the most complex research of appraisal staff; provides technical guidance to subordinate Property Assessment Specialist classes; calculates property bills and corrects computer system records, schedules, processes and distributes monthly, quarterly, and annual data sales; prepares quarterly and annual State Board of Equalization reports; maintains security access to ARCC Local Area Network (LAN) and all ARCC quality, make and model, condition and related factors.

MINIMUM QUALIFICATIONS:

Knowledge Level: T = Thorough; G = General; -- = Not Applicable

Classification Level: I = Property Assessment Specialist I
II = Property Assessment Specialist II
III = Property Assessment Specialist III

Knowledge of:

I II III

G	G	T	California Revenue and Taxation Code as it relates to property assessment and the appraisal of real, business, and personal property.
G	G	T	Real estate principles and terminology.
G	G	T	Procedures and methods used in the Assessor/Recorder/County Clerk's office to determine, correct or cancel property tax assessment.
G	G	T	Business and economic terminology.
G	G	T	Recent laws affecting property assessment.
G	G	T	Basic principles and methods used in making estimates of value.
--	--	G	Principles of supervision.
--	--	G	The General Management System in principle and in practice.

Skills and Abilities to:

- Note and measure real property.
- Utilize computerized spreadsheets and word processing software.
- Communicate effectively, both orally and in writing.
- Perform statistical and complex fractional interest and assessed value calculations.
- Review, understand and interpret applicable legal documents.
- Proofread and check information for completeness and technical accuracy.
- Read and interpret blueprints, maps, property descriptions, leases, deeds and legal documents.
- Apply laws and procedures in the correction of property tax assessments.
- Supervise, plan and coordinate the work of staff.

EDUCATION/EXPERIENCE:

Education, training and/or experience, which demonstrate possession of the knowledge, skills and abilities stated above. Examples of qualifying education/experience are:

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Property Assessment Specialist I:

1. A certificate from the Office of Real Estate Appraisers (OREA); OR,
2. A Regional Occupational Certificate (ROP) for Real Estate; OR,
3. Thirty (30) units of course work toward a college degree from an accredited college or university; OR,
4. One (1) year of experience in real estate appraisal, personal property appraisal, real estate sales, or building contracting; and at least fifteen (15) units of college-level course work as described above; OR,
5. Three (3) years of clerical experience in an Assessor's Office, with responsibilities that include processing deeds, institutional exemptions, leases, or other property documents relevant to change of ownership.

Property Assessment Specialist II:

1. Sixty (60) units of course work toward a college degree from an accredited college or university; OR,
2. One (1) year of experience as a Property Assessment Specialist I in the County of San Diego, or an equivalent class in another California County Assessor's Office; OR,
3. Five (5) years of clerical experience in an Assessor's Office, with responsibilities that included processing deeds, institutional exemptions, leases, or other property documents relevant to change of ownership.

Property Assessment Specialist III:

1. One (1) year as a Property Assessment Specialist II in the County of San Diego.

SPECIAL NOTES, LICENSES, OR REQUIREMENTS:**Note:**

Some positions in the Property Assessment Specialist II and III classes require applicants to have or obtain a permanent Appraiser's certificate issued by the California State Board of Equalization within one (1) year of appointment.

License:

This class requires possession of a valid California Class C driver's license by the time of appointment, or require the ability to arrange transportation for field travel.

Probationary Period:

Incumbents appointed to permanent positions in this class shall serve a probationary period of 12 months (Civil Service Rule 4.2.5.).